

A Study of Tacoma Narrows Bridge Users

Prepared for

Washington State Department of Transportation
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and
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Methodology

The Survey

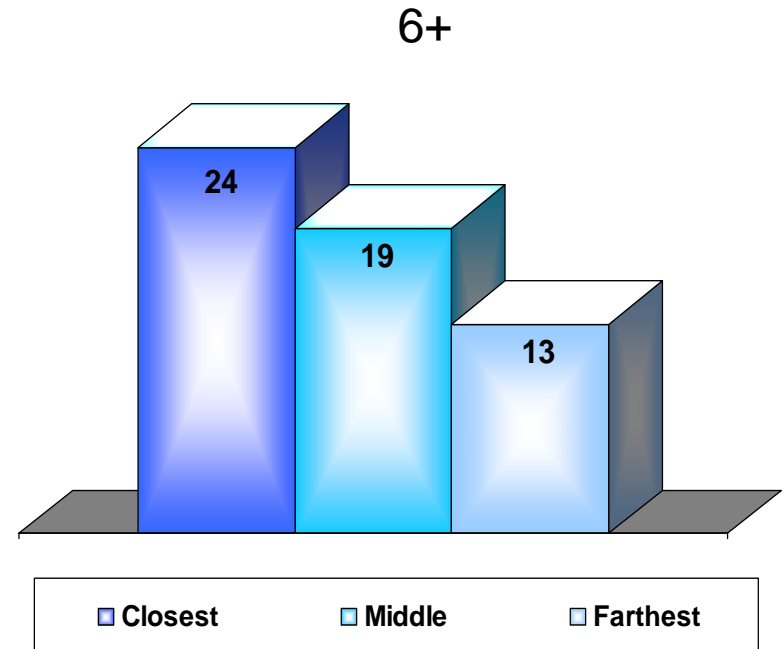
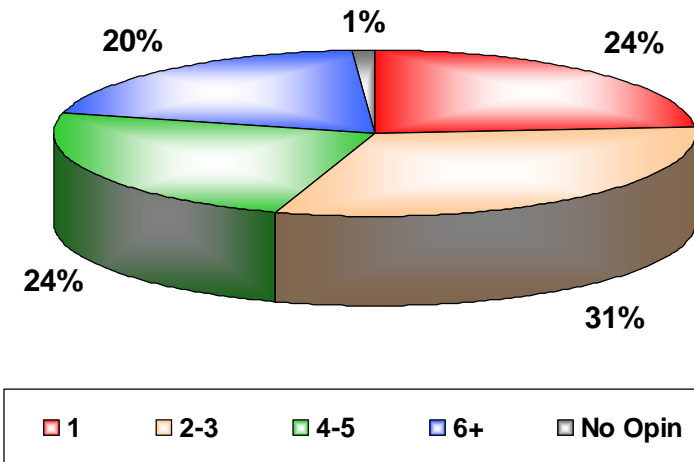
- 800 Tacoma Narrows Bridge Users
- Registered Voters
- Fielded: March 21-28, 2005
- 71 Questions / 5 Open-ended
- Approximately 15 Minutes

Geographics

- 47% came from the closest zip codes
 - (98335, 98406, 98465)
- 34% came from middle distance zips
 - (98332, 98407, 98466)
- 20% came from the farthest zips
 - (98312, 98314, 98337, 98359, 98366, 98367, 98405 & 98409)

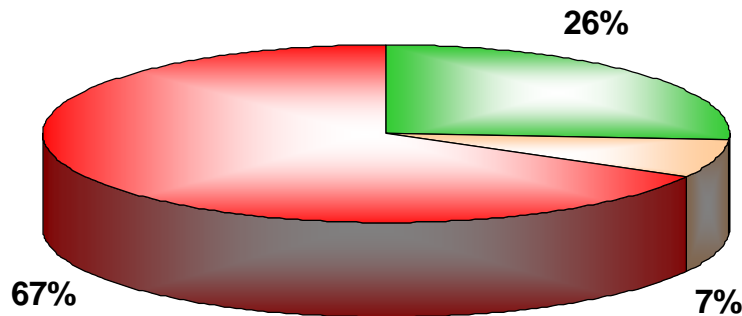
Round Trips Per Week

In an average week, how many round trips do you make across the Tacoma Narrows Bridge?



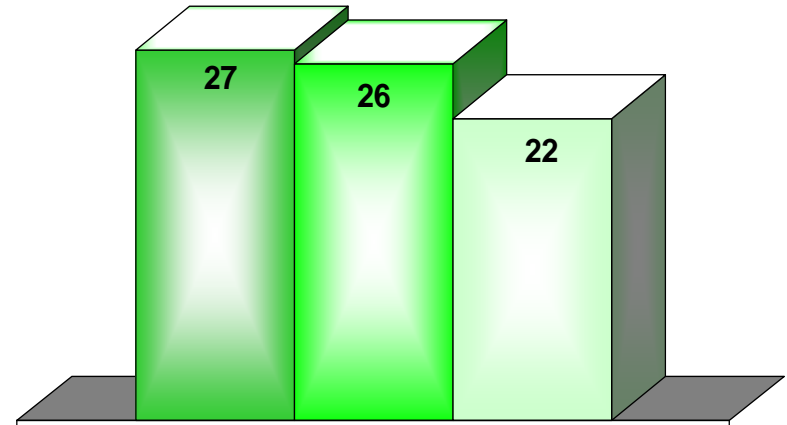
Time of Commute

On an average weekday, do you commute across the bridge to your work?
(Yes:) Do you commute during the hours of 6:00 and 10:00 in the morning?



■ Yes/6-10a ■ Yes/Other ■ No/Not to Work

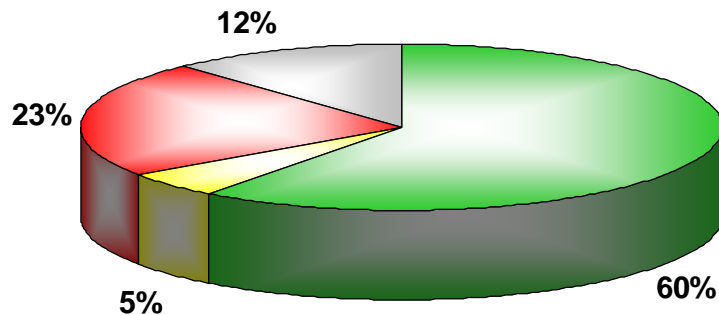
6-10a Commute



■ Closest ■ Middle ■ Farthest

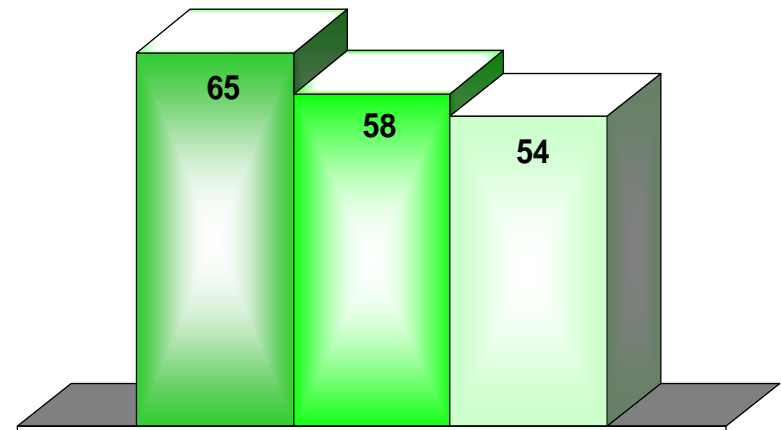
Knowledge of Toll

As you know, a second bridge is now under construction. As you probably have heard, there will be a toll to cross the bridge. This toll will be collected as you travel east toward Tacoma. To the best of your understanding ... what will the toll charge be?



■ Mentioned \$3 ■ < \$3 ■ \$3 + ■ No Opinion

Mentioned \$3



■ Closest ■ Middle ■ Farthest

Paying Off Bonds

Bonds are being used to provide funds to construct the bridge. Part of the tolls will be used to operate the bridge once it's completed. Regarding the remainder of the toll money, which of these two statements comes closer to your own opinion of how the Department of Transportation will use the remainder of the toll money?

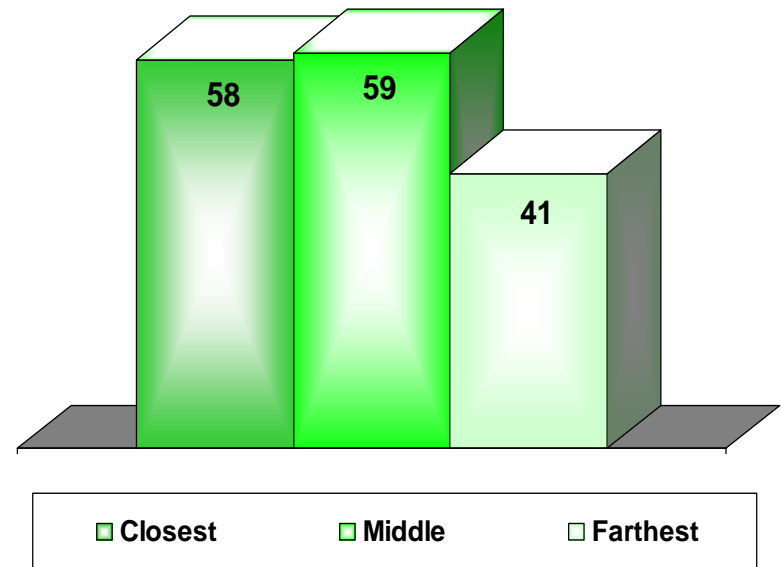
Almost all of the remaining toll money will be used to pay off the bonds 55%

OR

Part of the remaining toll money will be used to pay off the bonds and part of it will be used for projects in other parts of the state 33%

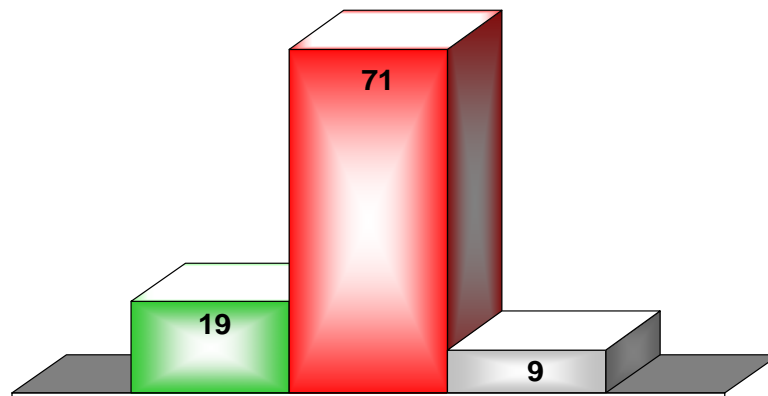
No Opinion 12%

Will Be Used to Pay Off Bonds



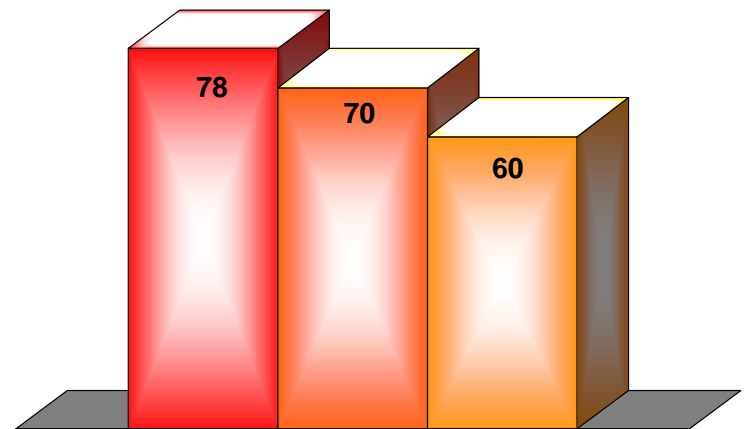
Will Toll Increase

When the bridge is completed, the toll will be \$3. To the best of your understanding, will this toll remain at this level or is it scheduled to increase?



Will Remain Will Increase No Opinion

Will Increase



Closest Middle Farthest

Two-Step Information Flow Electronic Toll Collection

(One-Half Sample)
N=400

Q.13:

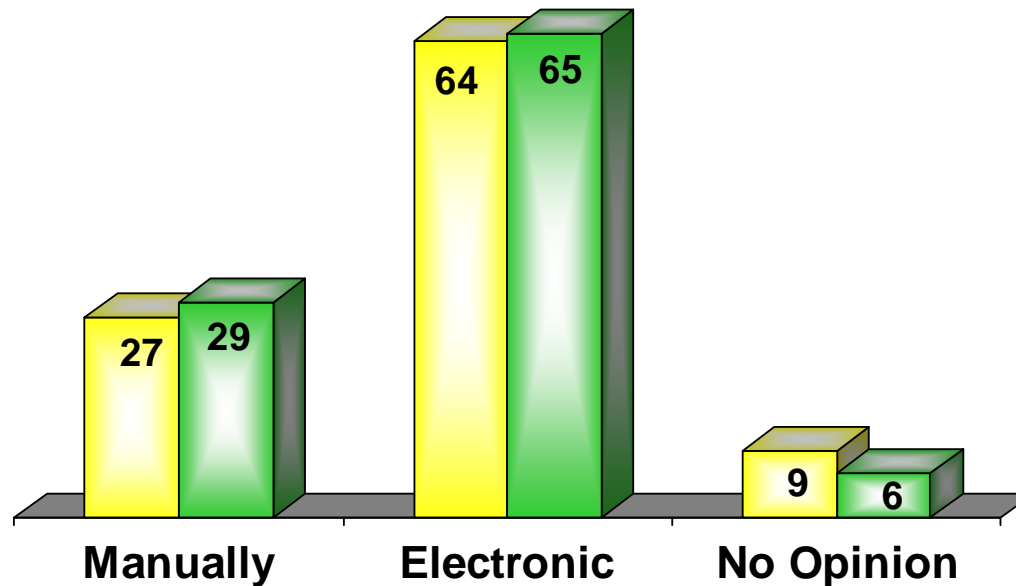
There will be two ways to pay the toll when traveling east across the new bridge. You can stop at the toll plaza each time and pay an attendant. Or you can use a transponder and electronic toll collection to pay for tolls. When the bridge is completed, do you feel you would be more likely to ... stop and pay the toll manually to an attendant, or use the electronic toll collection transponder system?

Q.14:

Here's some additional information. Electronic toll collection means you set up a pre-paid account with a credit card, receive a small transponder to put on your windshield near the rear-view mirror, and then each time you use the bridge, you pass by the toll collection plaza at normal speed without stopping. An electronic device will read your transponder and deduct the cost of the toll from your account.

With this information in mind, when the bridge is completed, now do you feel you would more likely to ... stop and pay the toll manually to an attendant, or use the electronic toll collection transponder system?

Two-Step Information Flow Electronic Toll Collection



■ Q.13-Initial Information ■ Q.14-With Additional Information

Electronic Toll Collection

Two-Step vs One-Step Information

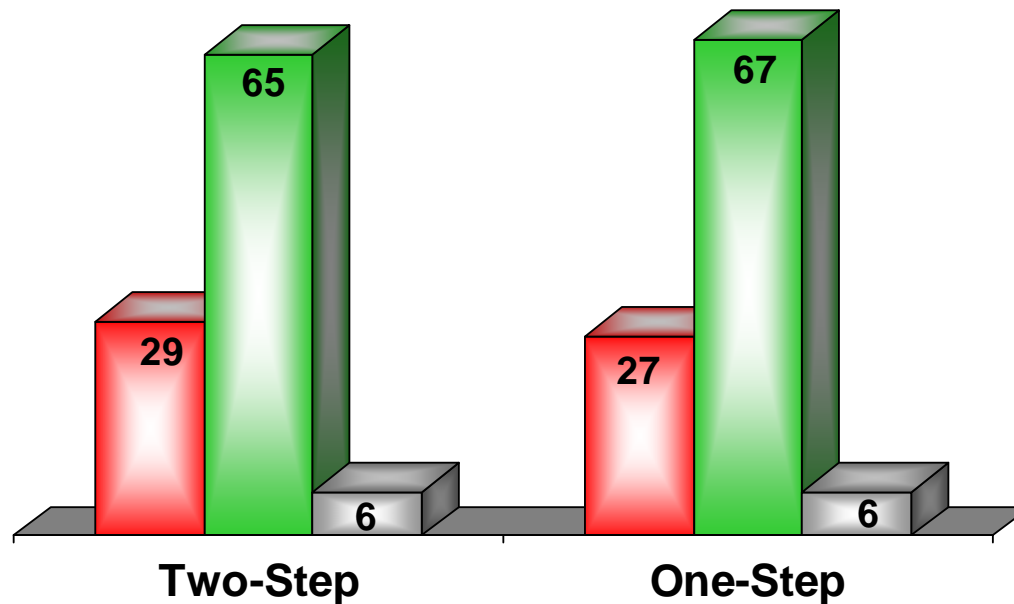
(One-Half Sample)
N=400

Q.15:

There will be two ways to pay the toll when traveling east across the new bridge. You can stop at the toll plaza each time and pay an attendant. Or you can use a transponder and electronic toll collection to pay for tolls. This means you set up a pre-paid account with a credit card, receive a small transponder to put on your windshield near the rear-view mirror, and then each time you use the bridge, you pass by the toll collection plaza at normal speed without stopping. An electronic device will read your transponder and deduct the cost of the toll from your account.

With this information in mind, when the bridge is completed, do you feel you would be more likely to ... stop and pay the toll manually to an attendant, or use the electronic toll collection transponder system?

Electronic Toll Collection Two-Step vs One-Step Information



■ Manually ■ Electronically ■ No Opinion

Reasons Pay Toll Manually

And what would be the two or three main reasons why you would choose to pay the toll manually? (N=108 of 400)

Seldom Use Bridge	44%
Access To My Credit Card	20
Credit Card Balance	14
Prefer Pay-As-I-Go	11
Anti-State	9
Transponder Malfunction	8
Miscellaneous	7
Live Person/Not Machine	5
Attachment to Car	3
General Negative	3
Multiple Vehicles	2

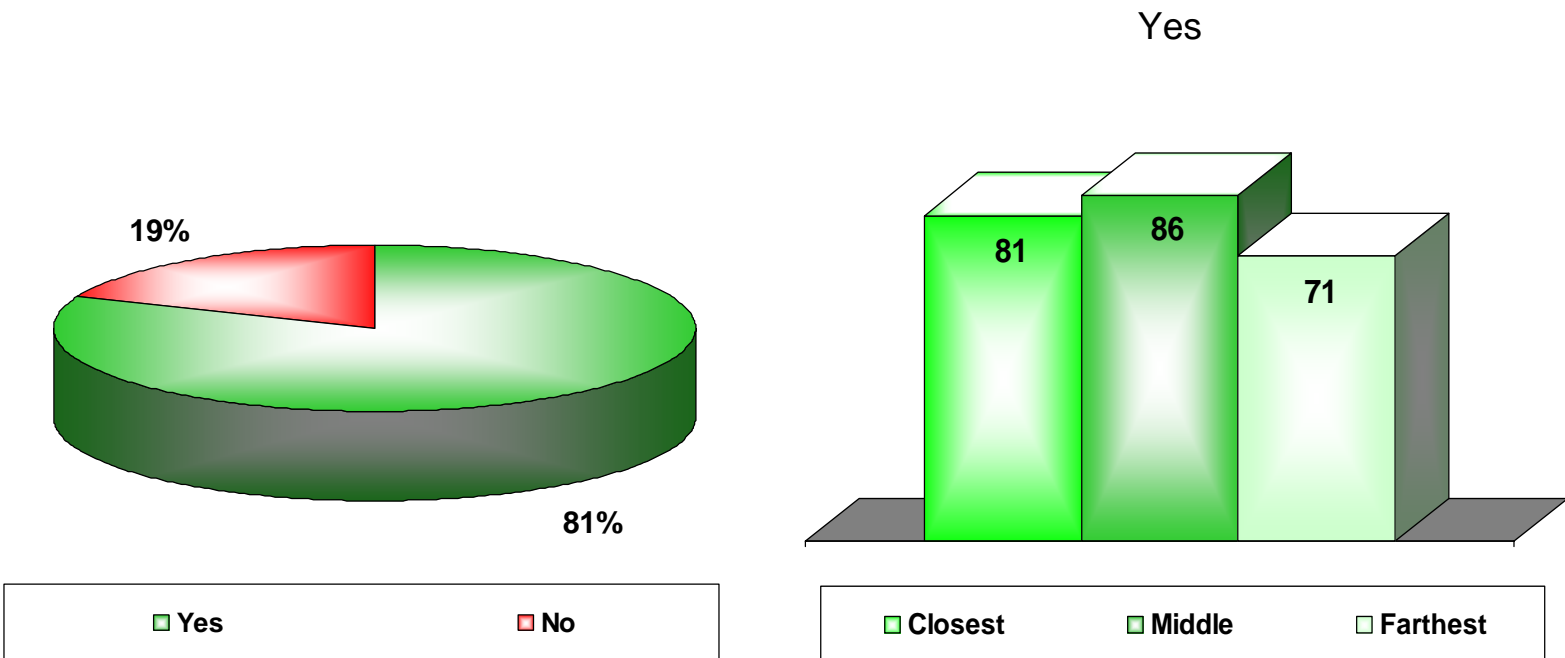
Reasons Use Electronic Toll Collection

And what would be the two or three main reasons why you would choose to use the electronic toll collection method? (N=267 of 400)

Faster / Save Time	53%	Payment Set-Up	3
Convenience	30	Economical	3
No Stopping	28	Miscellaneous	2
No Hassle With Change	20	Record Keeping	2
Easier / Simple	18	Fewer Employees	1
Help Traffic Flow	11	General Positive	1
No Lines	8	Don't Know / No Opinion	1

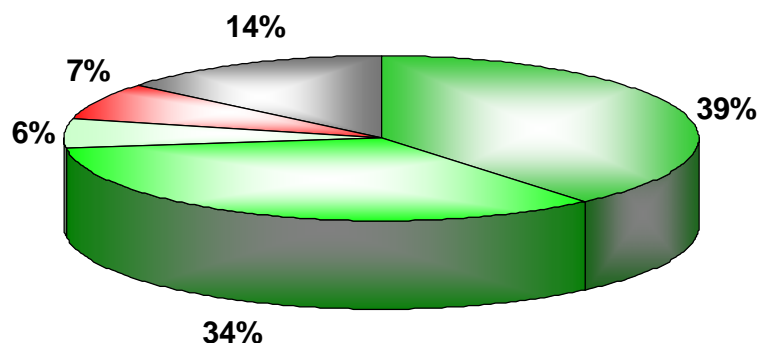
Aware of Transponders

Before our interview tonight, had you ever heard about transponders and electronic toll collection?

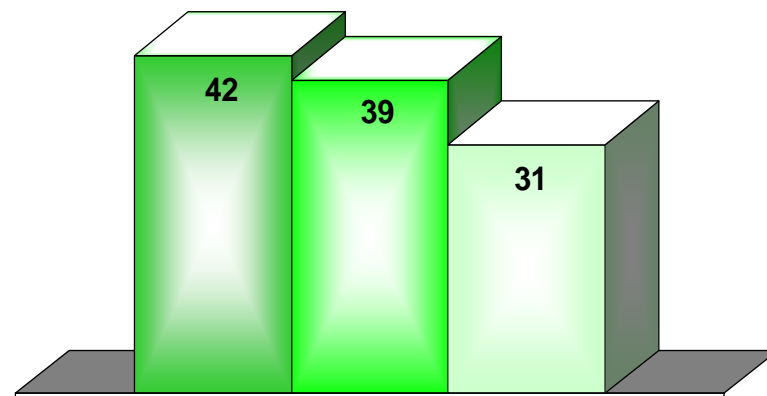


Feelings about Transponders and ETC

From what you understand, do you have a ... very favorable, somewhat favorable, somewhat unfavorable or very unfavorable impression about transponders and electronic toll collection?



Very Favorable



Closest Middle Farthest

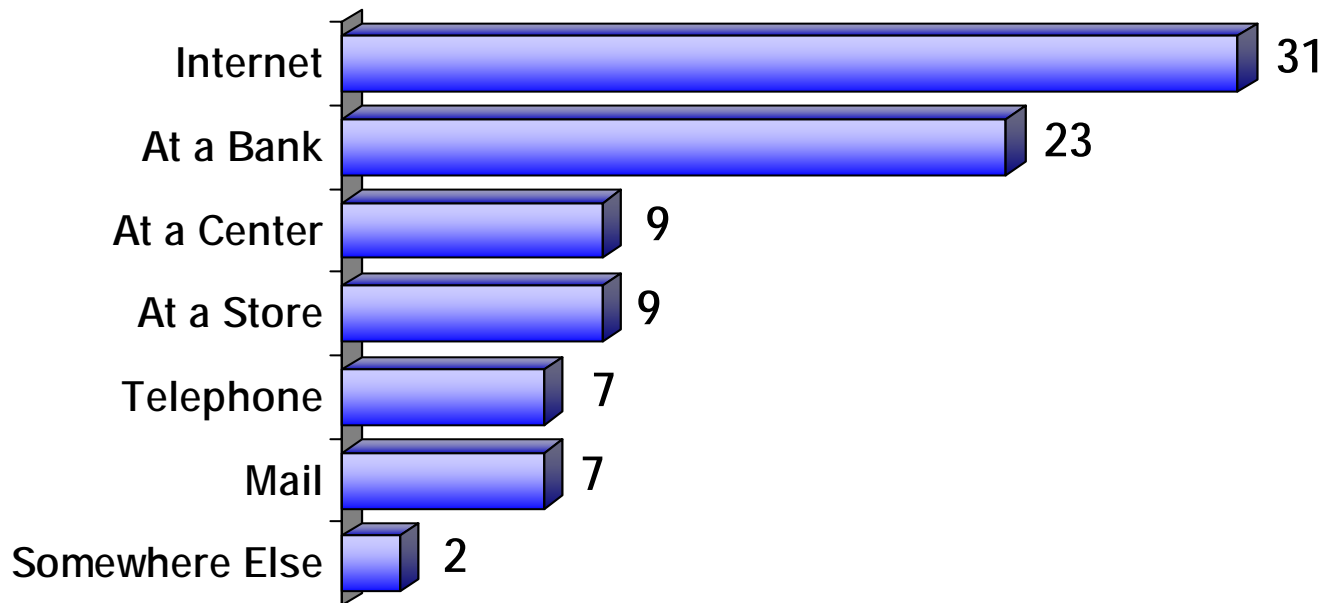
Concerns About ETC

Here are some concerns or uncertainties about electronic toll collection that other people have mentioned. For each one I read, please tell me whether it is ...a major concern, a moderate concern, a minor concern, or not a concern at all to you personally.

	<u>Maj Con</u>	<u>Mod Con</u>	<u>Min Con</u>	<u>Not Con</u>	<u>No Opn</u>
[SS2:] Concern that your account will be empty when you go through and you will be mailed a ticket	27	18	18	35	3
Concern that someone will steal your transponder and drain your account	22	16	23	38	1
[SS1:] Concern that your account will be empty when you go through and you will be pulled over and get a ticket	21	15	20	42	3
Concern that you will be billed for someone else's trip	20	19	22	38	1
Concern that your privacy will be violated	20	13	18	48	2
Concern that the scanner will not read your transponder correctly	15	20	24	40	2
Concern that something will go wrong and you will hold up traffic	13	14	23	48	1

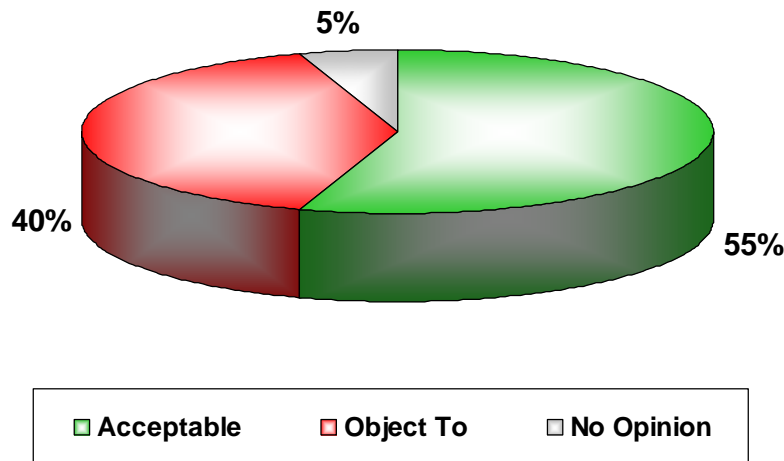
How Prefer Set Up

If you decided to set up an electronic toll collection account, would you prefer to set it up ...

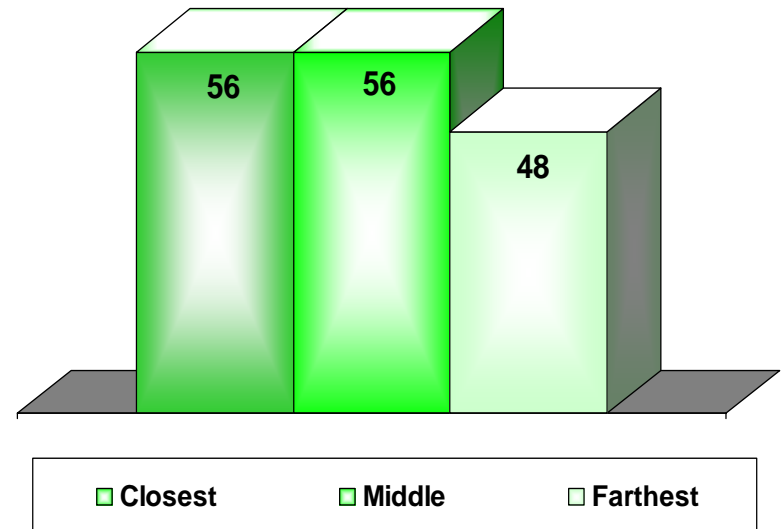


Automatic Replenishment

When people set up their pre-paid accounts, one method is to require accounts to be opened with a minimum \$30 charge – enough for ten trips – against a credit card, and when the account has only one or two trips remaining, it will be automatically replenished with another \$30 charge. Is this method something you would find acceptable, or is it something you would seriously object to?

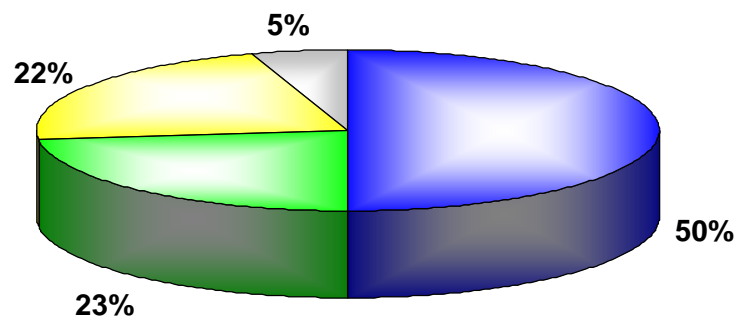


Acceptable



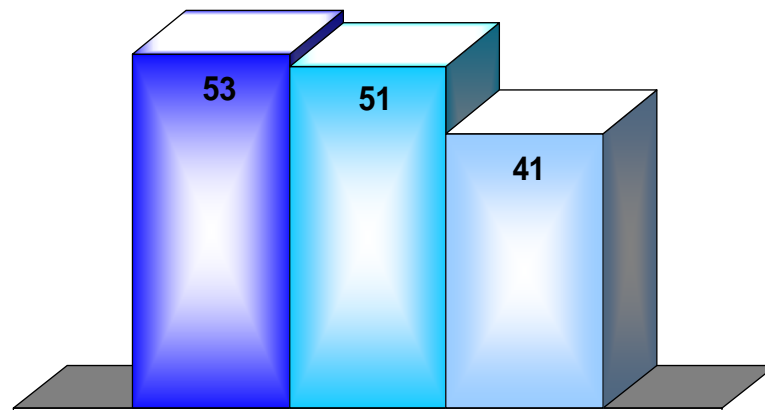
Ways of Paying

Other ways of paying for electronic toll collection are cash and checks. So, if you had the option of using ... a credit card, ... cash ... or checks, which one would you prefer?



■ Credit Card ■ Cash ■ Checks ■ No Opinion

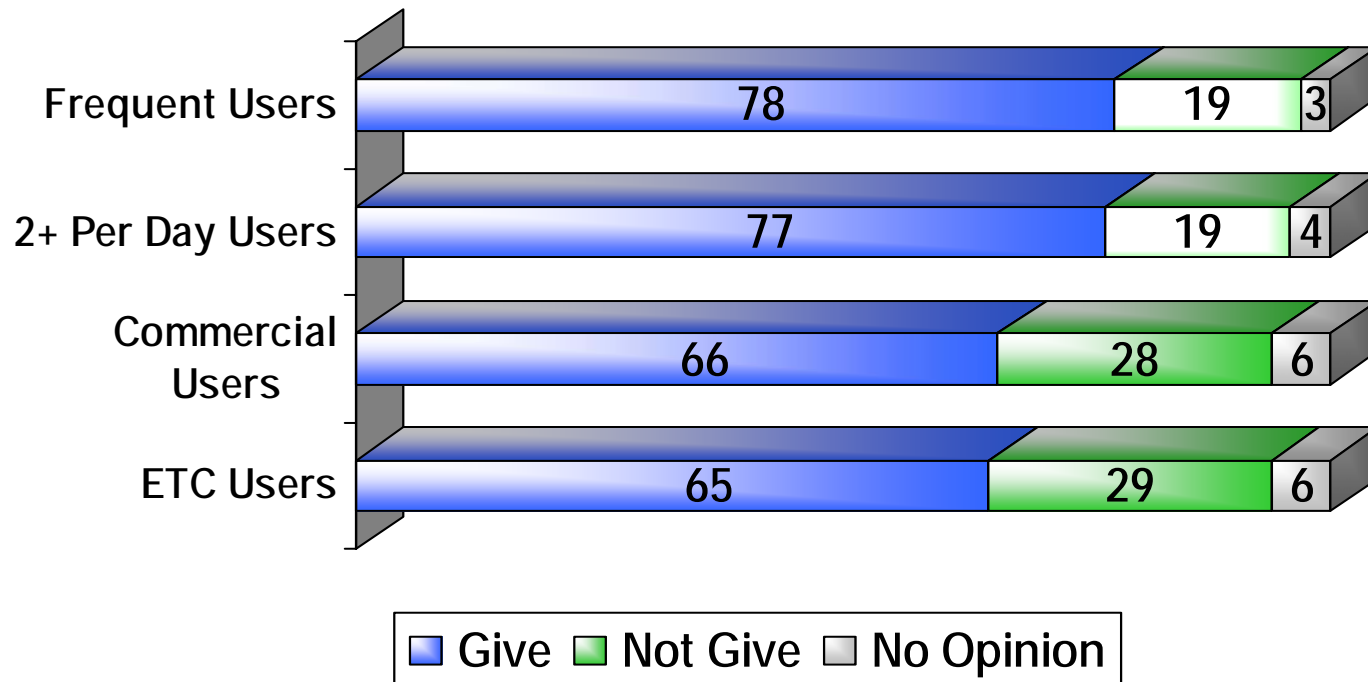
Credit Card



■ Closest ■ Middle ■ Farthest

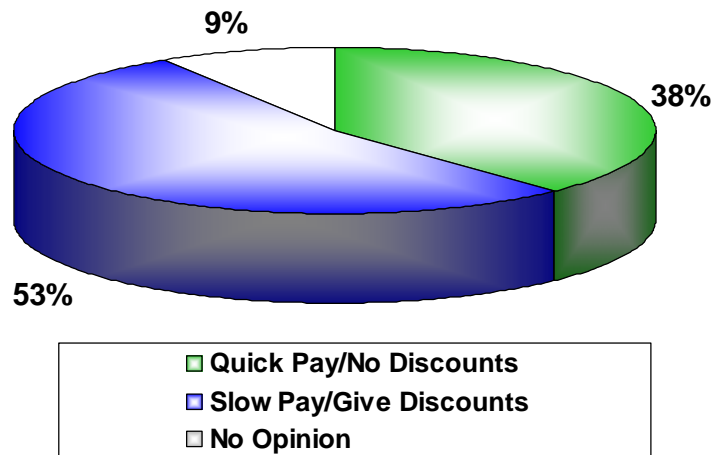
Discounts

There have been questions about discounts. Would you personally prefer that discounts be given or not be given to ...frequent users ... commercial users such as delivery men and airport shuttles ... those who use the bridge more than once a day ... those who use electronic toll collection?

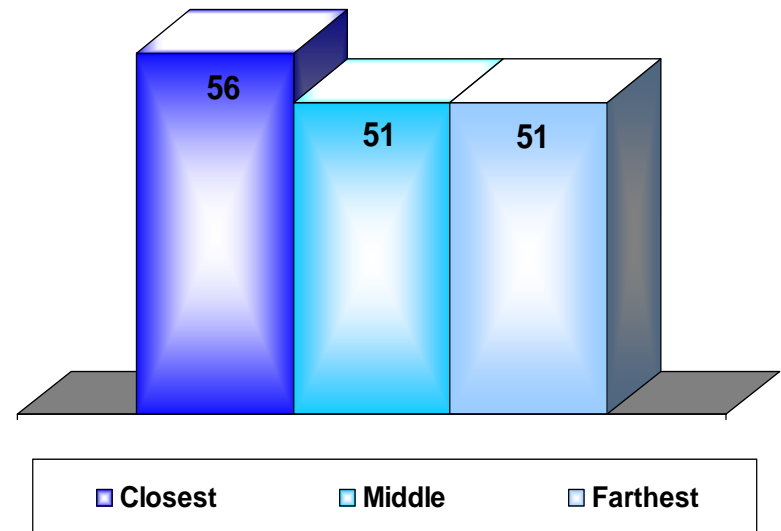


Bond Payoff Philosophies

Which of these two philosophies would you prefer ... pay off the bonds as quickly as possible within the 25-year plan and not give any discounts ... or ... pay off the bonds more slowly, say within 30 to 35 years, and give discounts along the way?



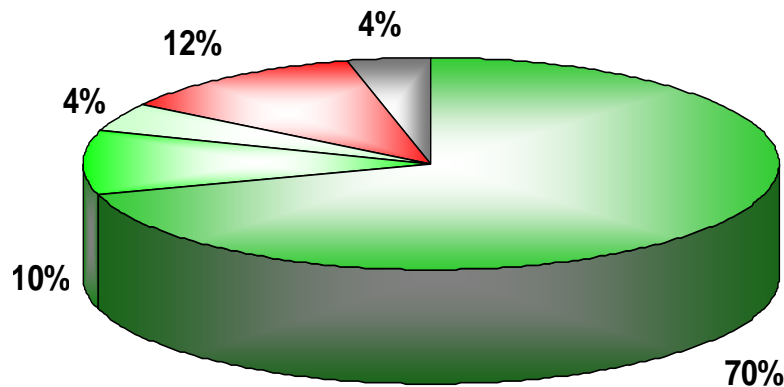
Slow Pay/Give Discounts



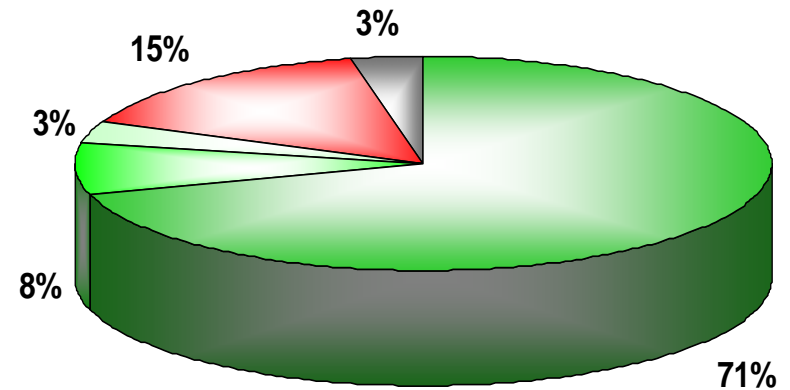
Advance Sign-Up Rewards

If you could get ____ free trips for signing up for electronic toll collection ____ days in advance of the bridge opening, would you sign up or wait?

Split Sample 1: 30 Days

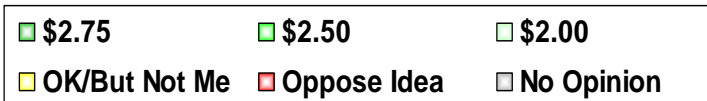
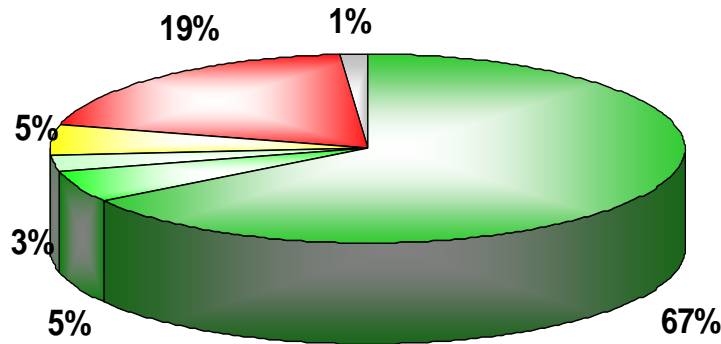


Split Sample 2: 60 Days

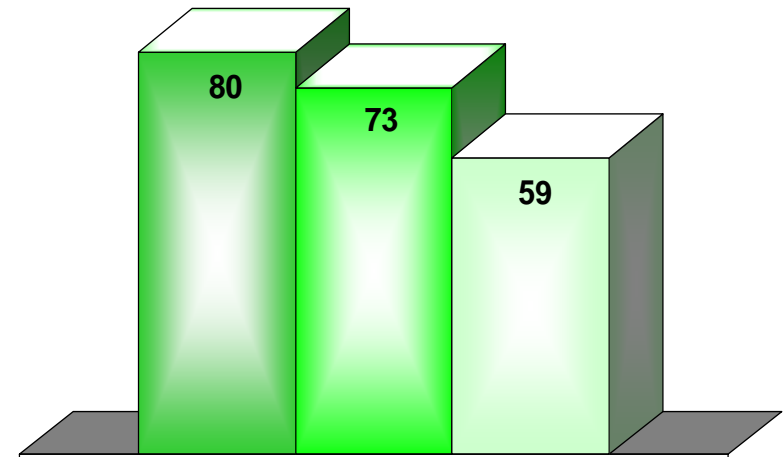


Discount for ETC

It has been suggested that those who sign up for electronic toll collection be given a discount so that their tolls would be \$___ instead of \$3.00.

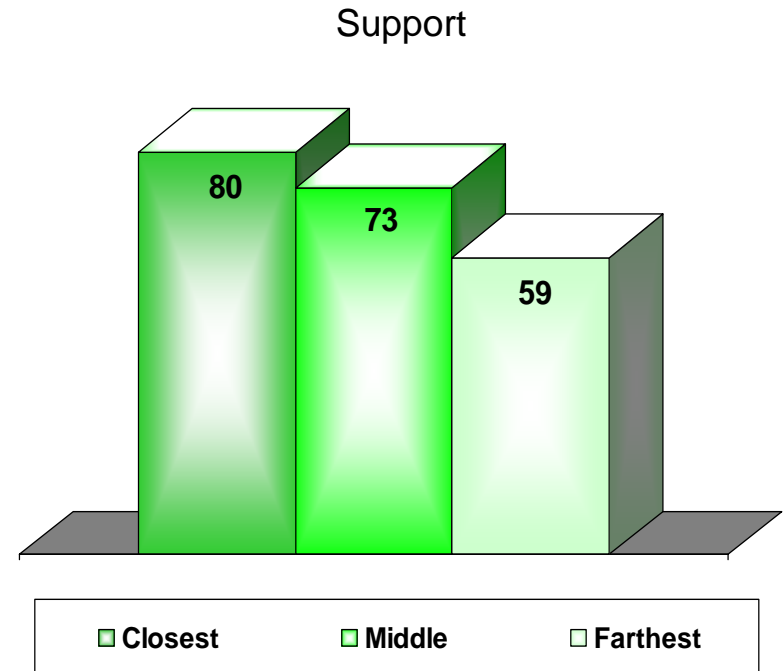
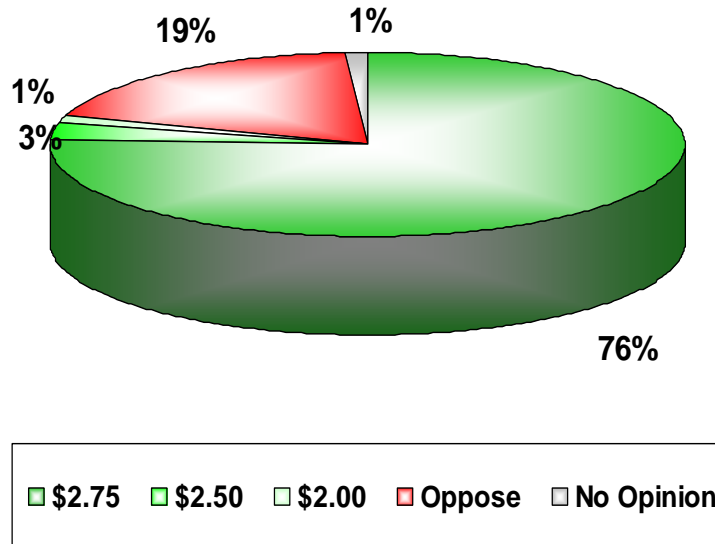


Support & Sign Up



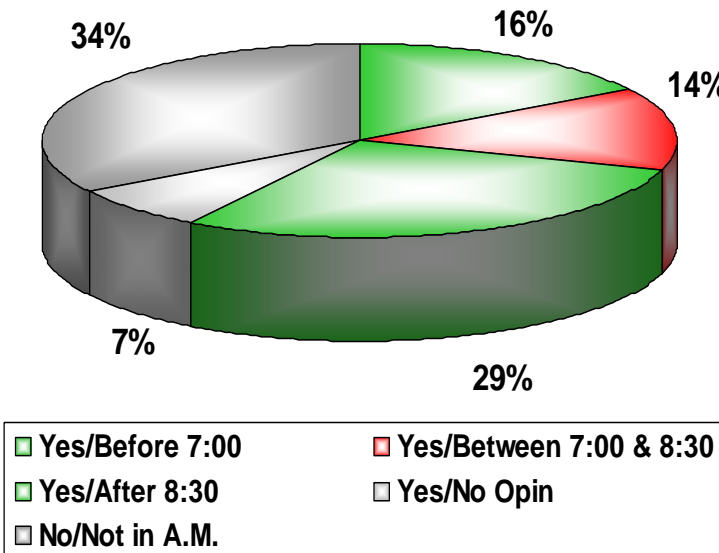
Discount for Frequent Users

It has been suggested that those who are frequent users of the bridge – those who use the bridge more than three or four times a week – be given a discount so that their tolls would be \$____ instead of \$3.00.

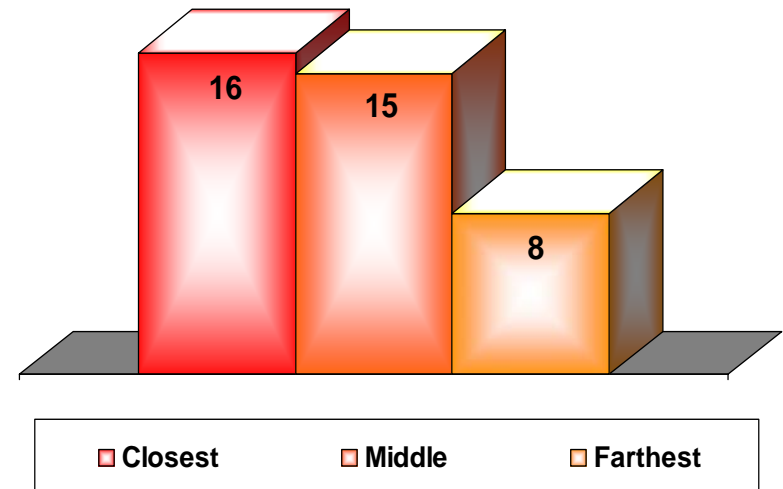


When Cross Bridge

On an average weekday, do you travel across the bridge in the morning? (If Yes:) When you travel across the bridge in the morning, do you usually cross the bridge ...



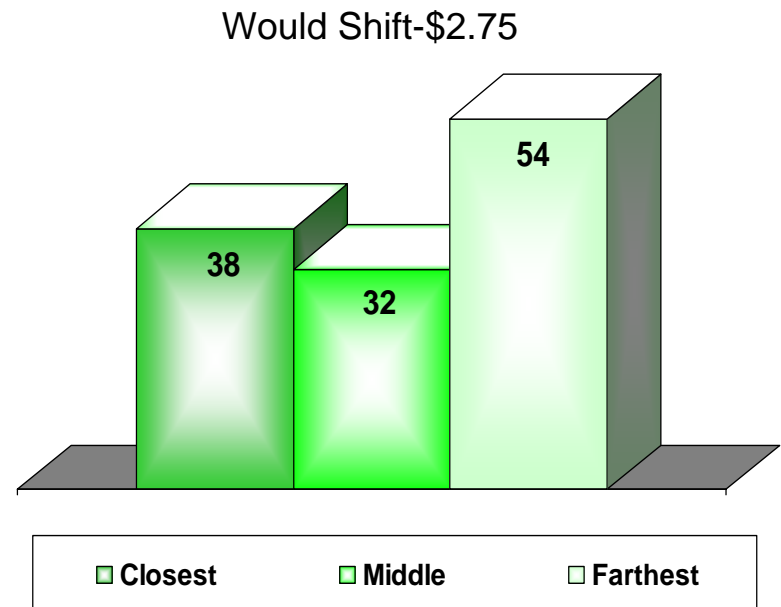
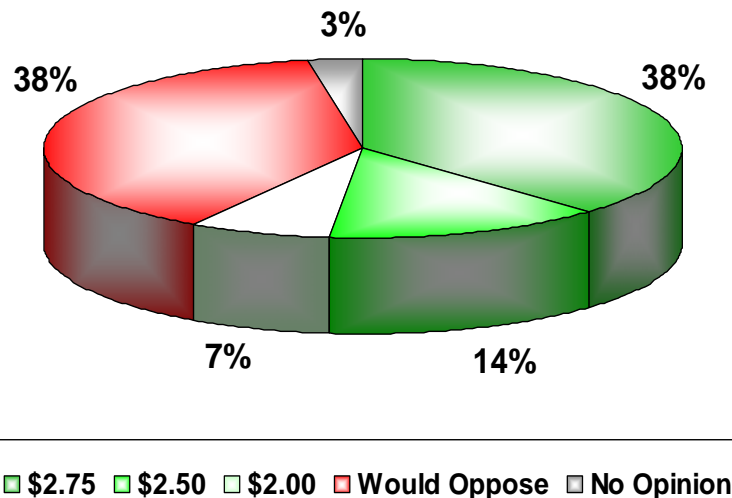
Between 7:00 & 8:30



Shift to Shoulder Periods

[Asked of those who cross between 7:00 and 8:30:]
(N=112)

The most congested period is weekday mornings from 7:00 to 8:30. One idea is to give a discount to those who cross the bridge in the “shoulder” periods of 6:00 to 7:00am and from 8:30 to 10:00am. This discount would only apply to those who have signed up for electronic toll collection and their toll would be \$___ instead of \$3.00. Which of these choices comes closest to your own opinion about this?



Summary and Application

A summary of key findings from both the focus group research and the survey research as they may apply to creating a name, crafting a positioning statement, developing messages and building a marketing plan.

Behavior

- 4.3 round trips per week for the closest zip codes
- 3.8 round trips per week for the middle zip codes
- 3.2 round trips per week for the farthest zip codes

Knowledge

- High awareness of tolls and moderately-high awareness of the \$3 price
- Moderate awareness that the toll will increase to \$6; low awareness of when that will be instituted
- Low awareness of bond details
- High awareness that tolls will be used to pay off the bonds, but low awareness of how long it will take
- Only moderate awareness that tolls will be on a per-use basis; some thought weekly and monthly passes could be purchased
- High awareness of electronic toll collection and transponders
- High awareness that there will be HOV lanes
- Low awareness of where the HOV lanes will actually begin and end, but people did a good job speculating and deduced that they would stretch from Olympic to the I-5
- Medium awareness that tolls will start to be charged when the new bridge is completed and while they are working on the old bridge

Attitudes

- Considerable skepticism about use of toll revenues – one third believe that all toll revenues (minus operations) will not be used to pay off the bonds
- Preference for ETC over manual pay is better than two-to-one
- Those who prefer manual pay nonetheless have a favorable image of transponders and ETC
- There are few major concerns about ETC, transponders and related operations
- The strongest supporters of ETC will be commercial users
- Most bridge users have moved beyond resistance to the project and are now focusing on how to use the system to greatest efficiency

Attitudes (Continued)

- Bridge users are high on discounts in general and would defer paying off the bonds by five or ten years to give discounts along the way
- Bridge users will respond quickly to even the smallest of discounts
- Two out of five core-period commuters would shift their commute to shoulder periods for a 25¢ discount
- For most commuters - there is no alternative to bridge use

What the Customer Sees

People hold five main expectations:

- Faster and smoother traffic flow
- Consistent flow
- Enhanced Safety
- More lane capacity
- End of tolls when bonds are paid off

The Value Structure

What the Customer Needs

- Certainty
- Control
- Choices
- Efficiency
- Hope
- Consistency

Characteristics of the ETC Product

Must convey solidness – the value of certainty

Must convey honesty – the antidote to side-funneled funds

Must convey improvement – a hope for better traffic flow

Must convey choices – which in turn signal control of one's life

Together, these desired values suggest that the most important trait to embed in the transponder/ETC product would be consistency. People will put up with a longer commute as long as they can plan their day and adhere to a schedule.

The Average Bridge Users

- I take three or four round trips a week across the bridge
- Now that the bridge is going to be built, I'm looking forward to a smoother and shorter commute
- I especially want a consistent commute so I can count on how long it will take me and plan my schedule accordingly
- I guess a \$3 toll is about right if there have to be tolls at all
- I don't like the future increases in the toll but will live with them

The Average Bridge Users (Continued)

- I want the bridge to become something in my life I don't have to think about, like not thinking about electricity when flipping on a light switch
- I like transponders and electronic toll collection because it makes it easier for me
- I intend to sign up for ETC, and gaining even a 25¢ discount would cause me to do it early
- I would prefer discounts even if it lengthens the bond payoff period; even a 25¢ discount would win my good will
- I'm not really interested in the details of the bonds; I just want the toll revenues to pay them off and not be used for other projects elsewhere in the state.

We would like to thank Washington State Department of Transportation, Wilbur Smith Associates and Frank Wilson & Associates for allowing our firm to conduct focus group research and this survey.

-- Lawrence Research